

INSTITUTIONAL PLAN SUMMARY

The Museum regards planning as an essential and evolving tool to manage institutional development and growth. The Museum's long-range plan supports the mission by addressing through the year 2004 the needs of a diverse and growing audience, issues of access to a nationally-significant collection, and the responsibility as an educational institution to further public understanding and appreciation of Concord's history, as well as its relationship to the cultural history of the Nation. The Museum's long-range plan, approved by the Museum's Board of Governors in August of 1999, established obtainable, mission-directed goals for all areas of operations - from exhibition and program development to collections management, from marketing to improved capitalization. While the mission statement is the cornerstone of the Museum's activities, the plan outlines the philosophical goals that guide efforts in collections presentation and preservation, visitor experience, education, staffing and fiscal responsibility.

The 1999 plan is the most recent in a series of long-range plans that have transformed the institution from a small decorative arts collection to an Association of American Museums (AAM) accredited history and decorative arts museum with a full range of programs and services. The Museum's first formal long range plan was implemented in 1986 and amended in 1991, 1993 and 1995. The plan outlined the Museum's priorities for audience development, programmatic initiatives, and physical plant expansion and resource development. Accomplishments of the Plan were significant and included the construction of a new 10,500 sq. ft. addition; major permanent gallery changes (reinstallation of period rooms, creation of decorative arts/history galleries, installation of *Why Concord?*, and creation of the *"Exploring Concord"* film); publication of the 160-page collection catalogue; and an approximately \$4 million capital campaign to support the expansion.

Building on institutional learning and competencies, in January 1998 the Museum began developing its current long range plan. A reaffirmation of the core elements of its mission statement contributed to the identification of six principal goals for the 1999-2004 Long Range Plan: 1) marketing and audience development; 2) enhancements to visitor experiences through new temporary exhibitions and selected permanent gallery improvements; 3) continuation of collections management improvements; 4) renewed commitment to human and physical resource development; 5) growth in the Museum's base of annual operating support; and, 6) strengthening of the Museum's endowment. With a stronger financial base, the Concord Museum will be able to continue program innovation, sustain its educational mission and preserve its nationally significant collection for the education and enjoyment of future generations.

Specific goals and supporting objectives for the 1999-04 Long Range Plan are:

Build Visitation and Audience- ♦by expanding the use of audience surveys to improve our understanding of the values and expectations of current, potential and target audiences, ♦by attracting a larger number of Concord's annual visitors to the Museum by positioning the Museum as THE gateway to Concord, ♦by offering appealing programs and exhibitions to attract repeat visits from regional audiences, ♦by continuing to reach new audiences through collaborative programs and cross-marketing partnerships, ♦and by expanding the adult group visit program.

Develop exhibitions and programs to captivate current and future audiences- ♦by developing a more coherent visitor experience and renovating targeted permanent galleries, ♦by continuing to develop a multi-year exhibition plan for temporary exhibitions, ♦by positioning the Museum as the primary place to see *Thoreau artifacts*, ♦by continuing to expand family and senior programming, recognizing the changing demographics of the region, ♦and by continuing to revise school programs to meet changing curriculum requirements and to complement the expansion of educational efforts by other cultural organizations.

Enhance Collections Management to ensure preservation for future generations- ♦by upgrading Museum security and fire protection systems to ensure that they continue to be state of the art, ♦by upgrading collection storage and display areas to improve artifact environment, ♦by computerizing collections records to expand access to the collections.

Achieve excellence in human and physical resource development -♦by including a wide range of talents, backgrounds and experiences on Board of Governors, +by increasing staff compensation and benefits to more closely reflect market rates in order to retain and attract high caliber staff, +by redefining Guild of Volunteers structure, +and by improving technological infrastructure.

Expand sources and level of annual operating support-+by increasing recurring annual revenue streams, + by raising targeted special project support from foundations and corporations, +by raising \$100,000 by 2001 for Endowment Challenge.

Develop and launch a \$6-10 million campaign for endowment and capital expenditures.

The planning process began with the reevaluation and subsequent reaffirmation of the core elements of the Museum's mission statement by Museum staff and Governors in January 1998, and the appointment in the fall of 1998 of a Long-

Range Committee of the Board of Governors, chaired by a long-time Governor and the Executive Director. The Committee also included a management consultant with strategic planning expertise, a social studies educator, a former human resources specialist, a marketing and tourism specialist, an experienced fundraiser and a business representative.

Early in the process, meetings were held to solicit input from all senior staff. The 1998-9 planning process coincided with and benefited from the Museum's internal self-assessment as part of its AAM Reaccreditation Self-Study.

The Long-Range Planning Committee established five subcommittees that each focused on one area of the Museum's operations: 1) visitation and audience 2) collections 3) human and physical resources, and 4) sources of support. During a three month period, they assessed current operations (through SWOT analysis) and made recommendations on long and short-term priorities in their assigned areas. A fifth task force developed five-year baseline financial projections. Additional expertise was provided by colleagues in collections documentation at the Museum of Fine Arts (Boston), conservators at the Straus Center for Conservation at Harvard, an engineer who specializes in museum buildings and climate control, a period costume consultant and a museum security specialist. To build support and consensus among the Museum's many constituencies, a full-day Long-Range Planning workshop was held by the Museum in May 1999 to bring together Museum members, Governors, Trustees, staff, volunteers, program participants and a diverse group of community representatives. This workshop provided an opportunity for the 42 attendees to assess the Museum's many accomplishments since the last plan, consider external factors that would affect the future and discuss the priorities recommended by each subcommittee. The conclusions of this workshop were discussed at the Annual Meeting of the Museum's membership at the end of May 1999. The staff and Long-Range Planning Committee prepared the final plan which was discussed and approved by the Board of Governors at their July and August 1999 meetings respectively.

To ensure that this plan serves the institution well, the Museum engages in a continuing process of monitoring and evaluation, making mid-course corrections when necessary. In early November 2003, the Museum conducted a leadership retreat with 50 Governors, Trustees, volunteers, community representatives and staff to review the plan's accomplishments and to assess the funding priorities of its current endowment campaign and develop a better understanding of the Museum's needs. The annual budget setting process provides an opportunity for assessing changes in the Museum's operating environment and for recommending possible strategic adjustments to the plan. Board committees are also responsible for guiding the activities in specific areas. Since many of the items contained in the plan are dependent upon successful fundraising, these activities are also evaluated regularly as part of the annual development plan. The Executive Director reports to the board on a regular basis about the progress in implementing the strategies contained in the Plan and provides a detailed report annually on the plan as a whole.

The Museum is proud of its **accomplishments** over the past four years:

- 1) Efforts to build audience have included extensive surveys of current, potential and target audiences; brand identity analysis; expanded paid, *pro bono* and cross-marketing efforts; creation of joint tickets with other Concord sites; logo redesign; new highway/interstate signage; addition of proactive group tour initiatives; and, the completion of an overall brand strategy.
- 2) The development of an active changing exhibition program, new family and community-oriented programs and family activity packs to encourage learning and exploration in the exhibition galleries. These have all helped to significantly increase institutional visibility, broaden the Museum's visitor base and strengthened the Museum's interpretation of the cultural history of Concord. Enhancements to school programs and new courses ("Two Worlds Meet"), have led to increased participation from ethnically and economically diverse communities and recognition by Massachusetts Department of Education as a cultural resource for curriculum development and MCAS preparation.
- 3) Collections management has been strengthened by environmental improvements (new window films, new HVAC chillers, climate control of costume storage) the recent computerization of 12,000 collection records (the entire collection excluding stone tools) and a restoration of Emerson's Study complete with reproduction carpeting and period wallpaper.
- 4) Human and physical resource improvements include systematic increases in salaries, addition of networked computer system and Internet access for all staff, office space renovations and reinvigorated board committees.
- 5) There has been an 18% growth in individual, foundation and corporate support since 1999. The Museum received a Massachusetts Cultural Council/Massachusetts Cultural Facilities \$50,000 endowment challenge grant in 1999 and raised 166% of the goal in half the allotted time.
- 6) The Museum has launched the quiet phase of its planned endowment campaign and has secured leadership gift commitments that have nearly tripled the Museum's existing \$1.1 million endowment.

2004 IMLS MUSEUMS FOR AMERICA GRANT

1. PROJECT DESIGN: PROJECT DESCRIPTION AND OVERALL GOALS

The Concord Museum is requesting support for a project to bring public awareness and accessibility to its distinguished collection of objects related to Henry D. Thoreau, one of the most widely-read, beloved and influential of American writers. This collection of 150 objects, the world's largest collection of objects associated with Thoreau and his family, presents a unique opportunity to teach about Thoreau's life, ideas and legacy. The three-part project will increase awareness of and provide intellectual access to the Thoreau collection through publication of an interpretive catalogue, a comprehensive presentation on the Museum's website, and expanded education activities.

Henry David Thoreau (1817-1862) is most often associated in the public's mind with his sojourn at Walden Pond and the book that followed. Yet as a cultural historian, abolitionist, naturalist, teacher, surveyor, poet, Transcendentalist, anthropologist, inventor and social critic, he used his keen eye, sharp mind, and sense of humor to "survey" his world in a myriad of ways. His work has been translated into countless languages and is on the syllabi of most college level courses in American literature. He has influenced some of the most noted leaders of the 20th century, including Mahatma Gandhi and Dr. Martin Luther King, Jr.. His inspiration on the American environmental movement, including pioneers John Muir and Rachel Carson, is profound. Thoreau's legacy to subsequent generations continues to shape and enrich our lives.

The Thoreau Collection was begun with a donation of a Revolutionary War cartridge box by Thoreau himself to Cummings Davis, the Museum's founder. Now the world's largest collection of objects associated with Thoreau and his family consists of over 150 objects - furniture, ceramics, glass, metalwork, books, manuscripts and textiles. Included are:

- The humble green desk on which Thoreau wrote "Civil Disobedience" and *Walden*
- Personal possessions such as Thoreau's walking stick, flute and spyglass about which he wrote and which now bring us in contact with Thoreau's physical environment
- Furnishings from the Thoreau family house which illustrate 19th-century economic issues and social reforms
- The 1861 ambrotype by E.S. Dunshee, the last known image of Thoreau (and one of only three lifetime)

The Museum presently shares its Thoreau collection with regional visitors, tourists from around the world, and distance learners through permanent and changing exhibitions, books and scholarly articles, and school and public programs.

- The Thoreau Gallery, one of six *Why Concord? History Galleries*, provides an overview of Thoreau's work as a surveyor, writer and naturalist, and objects from the collection have been used in temporary exhibitions at the Museum such as *Wild Flora*, which explored the New England tradition of botanizing
- There are six Thoreau entries in the 1996 *Concord Museum: Decorative Arts from a New England Collection*
- Selected images of the collection (for which photographs currently exist) are used with permission in textbooks, guidebooks, children's books, and books for a general audience, like Harmon Smith's *My Friend, My Friend: The Story of Thoreau's Relationship with Emerson* and on websites like "The Writings of Henry D. Thoreau"
- Public programs, such as *The Town of Emerson and Thoreau Walking Tours* attended by tourists and regional residents, use the Thoreau collection as a stepping off point for historical, environmental, and literary explorations
- The visually rich objects in the Thoreau collection together with the Walden house model on the Museum's grounds are resources for school programs introducing Thoreau to students of all ages.

As the steward of this national treasure, the Museum has an important responsibility to continue to share this collection with an ever broader and more diverse audience - local, national and international; school-age, adult, and elderhosteler. The goals of the proposed project are four-fold:

- most importantly, to increase public awareness of and intellectual access to the Museum's unparalleled collection of Thoreau artifacts in order to develop deeper public understanding of Thoreau's life, ideas and legacy
- to encourage visitors, teachers, students, scholars, and Thoreau-related institutions to view the Museum as a resource for object-based learning about Thoreau thereby stimulating new research in a variety of disciplines
- to build Museum visitation to see the highlights of the Thoreau collection on view in the permanent galleries
- to serve as a pilot for future Museum initiatives that will provide increased awareness and intellectual access to other highly significant parts of the Museum's distinguished collection-the unpublished Revolutionary war artifacts; the contents of Emerson's Study on view at the Museum, and the 17 h-19th-century needlework collection

In order to achieve these goals, the Museum is proposing a three-part project to make efficient and effective use of the strengths of the Thoreau collection and to incorporate the Museum's current body of knowledge with new scholarly research. Each of these activities will have long-term institutional impact.

- Publication of an illustrated interpretive catalogue which will serve as a tool for both the scholar and the generalist through sophisticated use of the objects themselves - how Thoreau used them, what they meant to his writings, why they were acquired, what they meant to the people who knew and admired him, and what they mean presently.
- A comprehensive presentation on the Museum's web site, including a searchable visual database of the entire Thoreau collection, an object-based interactive learning experience and standards-based lesson plans linked to the

- collection database for elementary, middle and high school teachers
- Expanded education activities including school courses, public outreach programs, and teacher workshops

The Catalogue

On September 15, 1860, Thoreau recorded in his *Journal*:

"Looked at Mr. Davis's museum. Miss Lydia Hosmer... has given him some relics which belonged to her... family. A small lead or pewter sun-dial, which she told him was brought over by her ancestors and which has the date 1626 scratched on it. Also some stone weights in an ancient linen bag... This was to me the most interesting relic in his collection. I love to see anything that implies a simpler mode of life and greater nearness to the earth."

This 19th-century visit by Henry Thoreau to the Concord Museum will be a stepping off point for a 128-page, four-color, hardcover published catalogue of the Museum's Thoreau collection. The catalogue will contain:

- Essays by curator David Wood on the collection and on Thoreau's own exploration of cultural history
- Forty-five extended entries (with 45 color illustrations; 20 black/white) for selected objects that can be most clearly linked to significant topics in Thoreau's life and work and in the life of the Concord community in the period 1815-1860. Among the selected objects are:

Desk Thoreau's green schoolmaster's desk bears an inscription in Thoreau's hand "Summer of 1838," the year that Henry and his brother John took over the Concord Academy. Subsequently, Thoreau took the desk to Walden and it was on this desk that he wrote *Walden* and "Civil Disobedience."

Chair "...I had three chairs in my house; one for solitude, two for friendship, and three for society," Thoreau wrote in *Walden*. This Windsor side chair fitted with rockers was about 30 years old when Thoreau took it to Walden in 1845. The chair came to the Museum in 1873, 11 years after Thoreau's death at age 45.

Flute One of Thoreau's companions on his excursions was a flute made in Albany, NY around 1820. It belonged originally to his father John, and bears the inscription "John Thoreau/1835/Henry D. Thoreau." A note to Thoreau from Emerson written in 1838, within a year of the beginning of their friendship, provides a pleasant view of the use Thoreau made of the instrument: "Will you not come up to the Cliff [Fairhaven Hill in Concord] this p.m. at any hour convenient to you where our ladies will be greatly gratified to see you & the more they say if you will bring your flute for the echo's sake, though now the wind blows."

The principal textual resource for the catalogue entries and essays will be Thoreau's own writings in his *Journal* and elsewhere. Secondary textual resources include Joan Burbeck's "The History Writings of Henry Thoreau", Lawrence Buell's *The Environmental Imagination: Thoreau, Nature Writing and the Formation of American Culture* and the Museum's unpublished, NEH-funded Thoreau research for the *Why Concord? History Galleries*.

- Brief descriptions, including dimensions, acquisition source and accession number of the remainder of the collection and related material from the Museum's general collection
- Extensive footnotes and a 6 page index

The catalogue will be an effective tool for scholars, Museum visitors, and distance learners. For scholars, the catalogue will serve as a resource from which they can understand how to interpret the objects and place them in context. The catalogue will also underscore the benefit of object interpretation in future scholarly research. For the many visitors who come to the Museum each year, the catalogue will offer continued learning opportunities post-visit and introduce them to new aspects of the collection not explored fully in the Museum's NEH-funded *Why Concord? History Galleries*. Distance learners will be introduced to the collection through the catalogue, increasing not only their awareness of the significance of the collection, but encouraging visitation either on the website or in person.

Distribution of the 3,000 catalogues will be through the Museum Shop, in the shops of sister institutions particularly those related to Thoreau, in area bookstores and online. The catalogue will be marketed through editorial review placement in special interest publications like *The Concord Saunterer* (a Thoreau Society publication), the *Magazine Antiques*, *Maine Antique Digest*, popular publications like *Yankee Magazine*, various academic publications related to literature and the environment and a number of e-mail listservs focused on Thoreau, the Transcendentalists, American literature and nature. The Museum is also exploring possible commercial distributors of catalogues and internet retailers like Amazon.com.

The Website

With literally hundreds of websites devoted to Thoreau now readily accessible on the internet, it is essential to use the strength of the Museum - the 150 objects in the Thoreau collection - to design a component of the Museum's website which will enable distance learning in a number of disciplines, provide an efficient research tool, and create user-defined interactive learning opportunities for a wide audience of varying interests. Originally launched in 1997, the Museum's website is currently being redesigned with pro-bono assistance from the design firm Corey McPherson Nash and computer expert William Serovy and is scheduled to be launched in the Fall of 2004. The architecture and design will be structured to embrace future additions, such as

the proposed Thoreau project.

A comprehensive presentation of the Thoreau collection on the Museum's website concordmuseum.org will consist of:

- an introduction to Thoreau-his life, ideas and legacy
- an introduction to the Thoreau collection at the Concord Museum, how it was acquired and its importance
- a searchable, visual database of the entire Thoreau collection with appropriate links to other websites, drawing from the research for the Thoreau catalogue, the development of the new Thoreau school program and the work that has been done in 2003 entering 12,000 collection records into the Re:discovery collection management database. Website visitors will be able to search the Museum's Thoreau collection database using text words, specific dates and period ranges, categories, origins and names. The collection records will include fields containing each object's composition, distinguishing features, place and date of origin and color images. Research information drawn from the catalogue will be incorporated into a notes section of each entry. The text will be presented with a summary appropriate for all levels of knowledge, as well as a narrative containing the more extensively researched information.
- an object-based interactive learning experience for school-age children
- standards-based lesson plans for elementary, middle and high school teachers with links to the collection database and to National Standards

The Education Activities

The Museum's foremost educational goal is to connect people with Concord's past through object-based learning. School programs currently serve 60 Massachusetts communities spanning the economic range, as well as 13 states. Over 11,500 school children participated in Museum activities in fiscal year 2003. Each school program uses an interdisciplinary approach to support the work of the classroom teacher and engage students in the learning process through hands-on activities, role-playing and first-person interpretation. The Museum also offers a range of outreach programs that expand programmatic reach beyond the Museum walls to audiences as varied as elderly in assisted living facilities to teens in correctional facilities. The proposed project will use the Museum's Thoreau Collection to enable these various audiences to investigate and construct meanings from objects such as the lock and key from the 19th-century Concord jail and the walking stick which accompanied Thoreau on his excursions. All education activities involve research, development, staff training, piloting, evaluation and marketing.

- A new in-the-museum program for grades 6-9 with a multidisciplinary approach to the investigation of the life, work and legacy of Henry Thoreau will be introduced.

The program will be linked to the Massachusetts State Standards and Frameworks in Social Studies, Language Arts, Science and Math and will use object-based learning to introduce the issues of individual rights, responsibilities, actions, and choices as reflected in the life of Thoreau. The Museum's collections will be used to explore Thoreau's role as an abolitionist, social activist, transcendentalist, and naturalist. Students will focus on his individual choices that had social, political and cultural implications and the impact of Thoreau's words and philosophy in the world today. A Teacher's Advisory group drawn from the regional community will provide guidance and curriculum expertise during the development process. Selected schools will pilot the project at the Museum and in the classroom. Pre- and post-visit materials will be developed to integrate the Museum experience into the classroom. Components of the grade 6 - 9 program include:

Lock & Key from Concord's Jail. Students will be asked to consider Thoreau's actions in 1846 when he refused to pay taxes to express his opposition to slavery as it became an issue in the Mexican War and consequently spent a night in jail. Students will investigate his work as an abolitionist in the Museum's *Reforming Concord Gallery* and discover how Thoreau drew upon the events of the American Revolution to justify his actions or criticize those of his neighbors. The students will connect the essays, "Resistance to Civil Government" (now known as "Civil Disobedience"), and "Slavery in Massachusetts" with the objects in the collection. Employing critical thinking skills, students will discuss Thoreau's influence on Mahatma Gandhi and Dr. Martin Luther King, Jr. Students will be challenged to consider how they would react to the issues of Thoreau's time, to the Indian Independence, the American Civil Rights Movement and to political activism today.

Walking Stick, Spyglass and Wilson's *Ornithology* Students will use Thoreau's walking stick, spyglass and birding book as access points for a discussion of his work as a naturalist and as a "protoecologist", discovering his keen observations and his methodology for recording scientific and statistical data.

Desk from Walden Students will consider how one man's experience and his writing have an impact today in the areas of science, ecology, and nature writing. Thoreau's work will be compared with that of John Muir and Rachel Carson, two other naturalists who wrote passionately about their bond with nature and devoted their life's work to encouraging public environmental awareness. Students, at the Museum or in the classroom, will explore how Thoreau contributed to the environmental movement of today.

- The successful program, *Meet Henry Thoreau*, that presents Thoreau as a writer, poet, naturalist, teacher and philosopher through hands-on activities for grades 2-4, will be expanded and enhanced.

This program is presently linked to the Massachusetts Learning Standards and includes: an object-related puzzle activity in the Thoreau Gallery; a stop at the Museum's full-sized model of his house at Walden; a visit with

Thoreau friend and neighbor, Mrs. Ralph Waldo Emerson (first person interpretation); and a "field trip" through the Museum to discover Henry as a naturalist, teacher and lifelong learner. The Museum will develop one new component in which students will work with a compass and surveying chains, replicating Thoreau's work, to acquire those skills identified as essential in the Science and Math State Frameworks. To better integrate the on-site visit with the classroom, pre and post-visit materials will be developed.

- A new and "portable" public outreach program on Thoreau for adult audiences will be launched. Using new-to-the-Museum technology (PowerPoint software, a laptop computer and LCD projector), the program will provide a virtual tour that brings the collection to a wider audience (libraries, historical societies, retirement/assisted living facilities, schools), a strategic plan priority. School program development work will be adapted and modified for the adult outreach program. Content will include images of Thoreau collection objects together with quotes from Thoreau's journals, essays and books. Thoreau can be explored as an abolitionist, social activist, transcendentalist or naturalist and his work will be related to that of Gandhi, King, Muir and Carson. Using provoking and open-ended questions, the Museum staff will facilitate lively discussion. First person interpretation with living history characters and hands-on activities will be incorporated.
- Teacher workshops on Thoreau for grade levels, 2-4, 7-8 and 9-11 will be developed and offered in-house and off-site to assist teachers in why and how to teach Thoreau to students today. Teacher Workshops will provide tools to introduce both object-based learning and use of other primary source material into the curriculum.

2. GRANT PROJECT GOALS

The Museum seeks to support lifelong learning through the proposed project which centers on the life, works and legacy of America's quintessential lifelong learner, Henry Thoreau. It is, perhaps, Thoreau's endless thirst for learning that wins him universal appeal to a present-day, intergenerational audience. Young children learn of Thoreau's cabin-building skills, his love of mountains, and his flute-playing with the recent flourish of children's books about Thoreau, particularly the work of New England author/illustrator O.B. Johnson. School age children studying the biography of Mahatma Gandhi, Rachel Carson and Martin Luther King, Jr. learn of Thoreau's influence on these heroes of the 20th century. College students seeking their way in the world often make life-changing discoveries when first reading *Walden*. Adults connect with Thoreau's biting social and political commentary and astute natural history observations.

Where learning was once thought to occur only in an academic or workplace setting, individuals in today's "learning society" also seek information and knowledge in free time, or through "free-choice" learning. The Concord Museum's Thoreau project will provide learning opportunities for individuals in each of these spheres. Because each constituent group - school, work and free-choice - has different learning styles, interests and access capabilities, the introduction of new technologies, newly-researched printed materials and newly-designed program offerings must be tailored to a variety of knowledge levels and interests with convenient access points. An IMLS Museums for America grant would enable the Concord Museum to continue its successful approach to providing life-long learning opportunities by making the Thoreau collection and the associated body of knowledge as well as new research available on-site, in catalogue format, as part of an outreach program, on the website and as the cornerstone for curriculum-based programming for schools. In doing so, the Museum will expand the core knowledge of this most important of American authors, raise awareness of and access to the Museum's unparalleled Thoreau collection, position the Museum as an engaging object-based learning resource, and build Museum visitation-all of which will have profound, long-term institutional impact.

3. HOW THE PROJECT FITS INTO THE STRATEGIC PLAN AND MISSION

The Museum's mission statement and strategic plan guide institutional priorities regarding collections and programs. The proposed illustrated interpretive catalog, presentation on the website and education programs are at the core of the Museum's mission - "dedication to further public understanding and appreciation of Concord's history" through the "use of its nationally-significant collection as the basis for exhibits, programs, and publications". The strategic plan placed paramount emphasis on the Museum's ability to "share its collection as widely as possible and provide the greatest intellectual access possible, so that others can help build a collective understanding of the past". For the Thoreau Collection, one of the Museum's three most important strengths, a major strategic goal of the plan is to "Position the Museum as the primary place to see Thoreau artifacts." To achieve this, the Museum identified the need to expand awareness and understanding of the Thoreau collection, aggressively market related school and public programs, and produce a publication on the unparalleled collection.

The project will serve as an investment in institutional capacity as well as having a long-term impact on the Museum's ability to both broaden audience and to increase intellectual access for other aspects of the collection.

- By responding to the requests of on-site visitors for "something to take home" in order to learn more about the Museum's Thoreau collection, production of the catalogue will increase knowledge about Thoreau and the Museum's collection of objects. With aggressive marketing, the catalogue will position the Museum as the place to see Thoreau artifacts, attracting both new and repeat visitors.
- The Museum's associated ability to provide a significantly expanded number of publication-quality photographs of objects from the collection to book publishers and scholars, as well as to journalists writing for the general audience in magazines and newspapers, will also result in increased awareness of the collection's importance which should translate

into increased visitation either in person or on-line.

- By responding to the omission of the Museum's Thoreau collection in the general Thoreau bibliography, the publication of the catalogue and the expansion of the Museum's website with a visual on-line database of the collection will serve to broaden the audience to scholarly writers and the general public. Access will be expanded through search engine optimization and listing of the Museum's website on such directories of resources as AllLearn, the Alliance for Lifelong Learning organized by University of Oxford, Stanford University and Yale University.
- The Museum has long sought to respond to the needs of the middle school teacher and student by offering challenging and dynamic educational programs based on the Thoreau collection. The Thoreau collection should serve as an important access point for studying middle school curriculum topics such as ethics, individualism, literature and environmental awareness. Development of the grade 6-9 school program based on the Thoreau collection will expand the Museum's audience at this level in the same engaging way as we have long served the elementary and high school classroom. Inclusion of standards based lesson plans on the website will further increase the Museum's ability to reach this audience.
- The development of a public outreach program will broaden the Museum's ability to serve those audiences who cannot physically come to the Museum but still seek a lively, provoking presentation based on scholarly research.

The catalogue production, expanded website presentation and the development of a vibrant public outreach program are intended to serve as pilots to expand intellectual access to additional aspects of the Museum's important collection, and thus will have an additional long-term institutional impact after IMLS funding ends.

- The process of catalogue research, writing, production and distribution will serve as a pilot for a series of Museum special-interest publications that will provide increased awareness and intellectual access to other highly significant parts of the Museum's collection-the unpublished Revolutionary war artifacts; the contents of Ralph Waldo Emerson's Study on view at the Museum; and the 17th - 19th-century needlework collection.
- The process of creating, testing, and evaluating an appropriate presence for the Thoreau collection on the Museum's website will serve as a pilot for future projects to incorporate other aspects of the Museum's collection into the ongoing expansion of concordmuseum.org. The template created of object access and search capability, teaching resources, and object-based learning experience will be applied to the Museum's furniture collection (as researched and photographed for the 1996 NEA-funded catalogue), clock collection (as researched and photographed for the 2001 "Keeping Time" exhibition and publications), and needlework collection (as researched and photographed for the planned exhibition and catalogue of needlework objects worked by Concord-area women).
- The outreach program using new-to-the-Museum technology (PowerPoint software, a laptop computer and LCD projector) will serve as a model for future projects involving other aspects of the Museum's collections, broadening the Museum's ability to engage audiences at libraries, historical societies, and retirement/assisted living facilities with a menu of programs ranging from Native American Lifeways to the American Revolution and from Clock Manufacture in Concord to Women's History.

4. STRATEGIC PLAN: PROCESS AND FINANCIAL RESOURCES

The priorities articulated in the Museum's 1999-2004 Long Range Plan are designed to further the Museum's mission and to ensure its long-term financial sustainability, while supporting the needs of the community. In 1998, the Museum's Board of Governors, led by its Long Range Planning Committee, solicited input from more than 60 Governors, Trustees, staff members, volunteers and community representatives. Throughout the year-long planning process these individuals participated in formal and informal focus groups, served on 5 subcommittees concentrating on specific areas of Museum activities and participated in a day-long planning workshop. Candid discussions included an assessment of the Museum's strengths, weaknesses, opportunities and institutional challenges. With this background, the participants worked together to articulate, discuss and build consensus on future priorities, culminating in the approval of the Museum's 5-year plan and subsequent presentation in the Museum's newsletter and at the annual meeting of its membership.

To ensure that this plan serves the institution and community well, the Museum engages in a continuing process of monitoring and evaluation, making mid-course corrections when necessary. Plan accomplishments and remaining tasks are assessed by staff and compared to plan objectives. This information is shared during regular meetings of the Board of Governors through formal reports and staff presentations on unique plan activities. Progress analysis is incorporated into the annual departmental budgeting and operating planning process along with assessments for human and financial resource needs. Board Committees help to monitor the ongoing activities directed at achieving the plan goals. In the fall of 2003, a group of 50 Governors, Trustees, volunteers, community representatives and staff attended a day-long retreat to review the plan's efficacy and to reassess the remaining plan goals. One of the most significant outcomes was a reassessment of programmatic and functional areas that will be supported by the present Endowment Campaign.

While the Museum has developed a healthy mix of approximately 41 % earned and 59% contributed income, in order to sustain its present and future level of activities, the Museum identified in the Strategic Plan the need to expand its base of support and increase its existing endowment fund. By increasing the Museum's endowment so that it provides 20-30% (presently only 5%) of the support needed to operate annually as recommended by experts in Museum finance, the Museum will be able to ensure its

long-term stability and sustainability. The Museum's Board of Governors has launched the quiet phase of the endowment campaign and to date has secured commitments that nearly triple the present endowment fund. Still in the "nucleus fund" phase, the Museum plans to set the campaign goal once several additional key solicitations have been conducted. It is anticipated that the goal will fall in the \$6-10 million range.

5. APPROPRIATENESS OF PROJECT FOR INSTITUTION, AUDIENCE

As the "Gateway" to Concord's historic past, the Museum is a destination and resource for visitors interested to learn about important events and individuals that helped shape our nation. Each year, the Museum welcomes more than 40,000 individuals through its doors: families; visitors with an interest in American history, literature or decorative arts; students of Native American culture; Revolutionary War buffs; Thoreauvians; scholars and educators. Repeat and casual visitors are largely drawn from the Greater Boston area (population 5,819,100 - 85% white, 5% African American, 4% Asian and 6% Hispanic) to participate in school courses and public programs and to see exhibitions and the permanent collection. Visitors from further away tend to be looking specifically for an experience that teaches them about the American Revolution, Concord's authors, and fine decorative arts. Geographically the Museum and its programs have wide appeal. Visitors come from all 50 states and over 20 foreign countries: 73 different communities in Massachusetts and other states participated in school programs, and members reside in over 50 towns.

Whether viewed in the *Why Concord?* galleries, studied in school courses like *Meet Henry Thoreau* or examined in public programs such as walking tours, Thoreau is central to telling the "story" of Concord's rich literary history. The activities proposed in the Thoreau project target a varied and encompassing audience: visitors to the Museum (on site and distance learners), teachers, students (elementary schools to elderhostels), scholars (material culture specialists, literacy scholars and historians), and Thoreau related institutions (The Thoreau Society, The Walden Woods Project and major libraries with Thoreau holdings-Houghton Library at Harvard, Morgan Library, University of Texas and New York Public Library). Because each group's level of knowledge, expectations for learning and access are unique, the project is proposing the use of a broad range of education tools.

The desire and need to receive extended information and greater access to the Thoreau Collection has been measured in both formal and informal assessment tools: directly expressed in surveys and written correspondence; demonstrated through program participation; or, perceived due to an absence of collection references in scholarly work. Museum visitors consistently ask in the guest book for more information about Thoreau. In surveys, visitors express their great satisfaction in learning about the lives of "great writers of the 19th century" in the *Why Concord?* galleries. When asked whether there were other subjects or topics they would like to learn more about, many specifically mentioned Thoreau, his life and relationships, and influence today. In surveys to libraries and assisted living facilities, living history was the most frequently identified program patrons would enjoy. The popularity of the Museum's annual Thoreau Lecture Series clearly demonstrates the interest in discovering a further understanding Thoreau's principles and influence on present day thinkers and writers. Now entering its 8th season, this series of five lectures is collaboratively organized by the Concord Museum, The Walden Woods Project and The Thoreau Society.

Teachers, an important Museum constituency, are looking to the Museum for help meeting state educational standards in language arts, science and social studies and to enrich their curriculum in the areas of writing process, the environment, and political activism-subjects for which the study of Thoreau is ideally suited. Specifically, Thoreau is identified in the social studies component of the state standards as one of the influential individuals worth investigating. While researching and designing the school courses and website lesson plans, the Museum plans to directly collaborate with teachers and curriculum coordinators to ensure that these programs meet student and school system needs. Drawn from regional schools, collaborators will be asked to complete surveys, sit on advisory committees, enroll their classes in pilot courses, and provide course feedback.

Scholars and Thoreau-related institutions are largely unaware of (or have limited knowledge about) the Museum's Thoreau collection and its importance to a more complete understanding of Thoreau. For example, material culture specialists will benefit from knowledge of Thoreau's pioneering approach to the study of artifacts. Literary scholars often have limited familiarity with how to read objects or incorporate them into their work on Thoreau. Historians have largely overlooked the value of the Museum's Thoreau collection in illuminating Thoreau's broader views about "culture." The proposed catalogue and the access to the collection database on the internet should well serve this target audience.

6. PROJECT RESOURCES: TIME AND BUDGET

The Museum is proposing a one-year grant request sufficient to accomplish the three project components. The implementation schedule has been structured to meet two specific timing deadlines. One goal is to have the catalogue completed and printed by June, in time for distribution during the July 2005 meeting of the Thoreau Society in Concord.

The school program pilot initiatives are targeted for completion in September 2005 in order to be available for the fall class registration for spring 2006 courses. To accomplish these two timely objectives it will be necessary for the Museum to initiate a portion of the catalogue research and writing as well as some program research before the start of the grant period in October 1, 2005. Research is central to all three components of the project. It will serve as the content of the catalogue, provide new

material and interpretations for education programs, and guide and support the information made available through web access. In addition to helping to meet the July 2005 publication deadline, the pre-grant catalogue work will make it possible for the website and program development activities to start shortly after the grant period begins, helping to meet the program's target Fall 2005 completion.

With a strong track record of raising support for institution-wide projects the Museum has structured its budget request to split many project costs allowing the Museum to appeal to individuals, foundations and corporations to supplement its match contribution. The catalogue and computer equipment provide funders with possible visibility and tangibility. Previous grants have included an individual contribution of \$27,000 to support the restoration of the Emerson Study and a \$6,270 grant from The Sudbury Foundation to purchase a digital camera and the collections management software.

Human resources comprise the Museum's greatest institutional resource commitment to carry out the project. The Concord Museum is prepared to effectively manage and implement this project by allocating sufficient staff time and resources to realize its completion in a timely manner. Because the project represents a long-term investment in the Museum's capacity and is clearly a priority of the strategic plan, staff from the collections, education, and public relations areas will be called upon to direct their efforts to specific project activities involved with project development, management and implementation. Annual plans will reflect this emphasis as both a priority for the institution and individual staff. For the part-time staff, the program initiative will require additional hours.

7. PROJECT RESOURCES: PERSONNEL AND TECHNOLOGY

The project involves several different Museum functional areas and will therefore be managed by a cross-departmental team lead by the executive director and including: curator; registrar; director of education; school program coordinator; and, public relations officer. This team possesses many years of Museum experience, institutional knowledge and understanding for Thoreau. Each member brings an in-depth understanding of their area's audience, subject matter and needs, ensuring that the project components will be appropriately designed and implemented. The team approach will serve to share the workload responsibilities, thus preventing the need to hire any new staff or reallocate ongoing responsibilities. Because this project directly contributes to strategic plan goals in critical programmatic areas, the staff time requirements will be both a high priority and complement each individual's scope of ongoing work.

Executive Director, **Desiree Caldwell**, appointed in 1996, has more than 25 years experience in museum administration, promotions, exhibitions, and publications. She guided the Museum through the opening of "*Why Concord?*," successful self-study and reaccreditation by MM, the 1999 Board-approved 5 year strategic plan, and has begun the quiet phase of a capital campaign to build endowment. Desiree was an Assistant Director at the Museum of Fine Arts Boston for 7 years, in charge of their exhibition and publications programs. She has an MBA from Harvard and serves on the boards of Thoreau Farm Trust, SPNEA and Concord Chamber Music Society. Curator **David Wood** has directed all aspects of the Museum's collections for 19 years from scholarly research and writing to acquisitions to collections care. He is responsible for interpretation, design and installation of most temporary exhibitions. David was the writer and editor for *The Concord Museum: Decorative Arts from a New England Collection*, 1996. Since 1997 he has produced 11 different exhibitions and published 9 scholarly articles about the Museum's collection. **Judy Stern**, Director of Education has been with the Museum for 13 years. In her role she is directly responsible for developing, delivering, and evaluating school and public programs. She oversees visitor services, interpretive staff, and collaborative programming. School Program Coordinator, Verna Tuttle has 18 years of teaching experience in Concord and the U.K. and is responsible for implementing the "Frameworks," course research and development, teacher training, and supervising Museum education staff. She works closely with curriculum specialists and classroom teachers to refine and develop courses. Registrar, **Erin McGough** has electronically cataloged 12,000 of the Museum's collection records and oversees all records relating to the Museum collections. She has previously worked at the Peabody Museum, Harvard University and the Corcoran Gallery of Art. **Carol Haines**, Public Relations Officer, has served the Museum for 22 years. Carol was directly responsible for the Museum's first website creation and is now managing the site's revision activities as part of a multiyear marketing initiative. She has served as researcher and guest curator, and for the past 11 years, chief designer and writer for most of the Museum's marketing, communication and promotional materials. **Richard Smith**, Education Staff, has been an historic interpreter and educator for the past six years. At the Museum he has researched and taught public and school programs. Richard has researched and developed a first person interpretation of Henry Thoreau that he presents in Concord and throughout the eastern United States.

BUDGET JUSTIFICATION

The Project budget is an effective and efficient solution to address the goals and objectives. Further efficiencies result from the extent to which existing staff members will take on many project responsibilities that directly relate to their programmatic areas rather than adding new employees. Many of the consultant and service components have been chosen based on existing working relations with the Museum or best product determinations.

STAFF: All staff proposed for the project are currently full-time or part-time Museum employees. A percentage of their available time dedicated to the project has been indicated along with a description of their involvement. Because this project contributes so extensively to the strategic plan objectives, the staff time required to complete project is considered a priority and will be appropriately integrated into work plans. Fringe benefit calculations included health insurance, 403b contributions, long-term disability and employer FICA tax contribution. On average, these benefits equal 15% of staff compensation.

- Desiree Caldwell, Executive Director, will primarily serve as a project advisor. She will be directly involved in all aspects of the project planning and decision making, lending her expertise and experience in publications, collections, promotions and management. She will also play an important role in ensuring that the Project outcomes are consistent with the mission and add to and support strategic initiatives and future planning (5% for 12 months).
- David Wood, Curator, will be directly responsible for researching and writing the catalogue. He will also oversee all publication activities, managing the ongoing work and relations regarding editorial process, photography, design and printing. David will also be responsible for managing the incorporation of research into the collection records and information accessible through the Re:discovery software. Because of the timing of the publication deadline, David will begin a portion of the catalogue research and writing prior to the grant period. Once the project begins, his efforts will be more concentrated in the beginning of the project, but continuing through till the catalogue is ready for distribution (averaged to 20% for 8 months).
- Carol Haines, Public Relations Officer, will be responsible for heading up the website design, development and implementation, including the text writing and consultant working relations. She will also work with the Curator and Registrar as an advisor for the catalogue text and design and collection record text. She will also design program marketing materials. Carol's time will be redirected from the overall website redesign, due to be completed prior to October 1, 2004. Many of her existing public relations and marketing activities will also directly overlap and complement her Project involvement (10% for 12 months).
- Judy Stern, Director of Education, will be responsible for overseeing all aspects of the program research and development, staff training, program piloting and refinements. She will also oversee the content development for the website interactive component and lesson plan and teacher workshops. Judy will serve as one of the pilot teachers, specifically for the outreach program (15% for 12 months).
- Verna Tuttle, School Program Coordinator, will supervise staff and assimilate all research and development ideas for the new course, revised course, public program, teacher workshop and website components. She will identify and organize the teacher/curriculum coordinator participation and oversee the pilot phase of the courses and outreach program (10% for 12 months).
- Erin McGough, Registrar, will be responsible for using the resulting Thoreau collection research to compose appropriate text, identifying links among objects and to other sites on the internet. She will also manage the Re:discovery For Internet installation, setup and configuration process (30% for 4 months)
- Richard Smith, Education Staff, will be directly involved in the course and public program research and development. In addition, he will also serve as one of the pilot teachers, including providing first person interpretation of Henry Thoreau for the public program (75 hours).
- Part-Time Education Staff, approximately 7 part-time staff will be engaged in the program research development, staff teacher workshops, and pilot program teaching. They are intimately aware of the collection and have Museum course teaching experience.

CONSULTANTS: The Project will involve several consultants. **Bill Serovy** has extensive experience in website installation and development including the technical assistance he is providing the Museum for the current website redesign. Bill will be directly responsible for the technical aspects of the Thoreau page, especially as this relates to the interactive component and links to the database. His effort will require 120 hours of work at a rate of \$50/hour (\$6,000) which he has agreed to contribute *pro bono*. **Dave Bohl** specializes in still photos and has worked very successfully with the Museum to capture collection images for publications and exhibition promotions. David will photograph 45 color and 20 black and white images for use in the catalogue and to create digitized images for the web. He does not require

copyright to the images, allowing the Museum to publish and grant use rights to the images without further cost. His service would be required for five days totaling \$4,000 (\$800 per day). **Lauren Byrne** will be contracted to conduct the catalogue copy editing and proofreading. She has extensive experience in this area and her fees are considered to be very reasonable for the approximate 134 page text (128 page text and 6 page index) \$1,173. **Corey McPherson Nash** (CMN) has been selected to provide the design expertise necessary to both integrate the concept and context for the Thoreau web page into the architecture and user access of the entire site. This will require 10 days work and cost \$10,000. This nationally known and widely acclaimed marketing and design firm has an intimate knowledge of the Museum due to its current involvement with the website redesign and past involvement with the creation and implementation of the Museum's branding strategy. Consultation to setup and configure the web pages for Re:discovery For Internet will be provided by the **Re:discovery** company (\$2,520). Standard web page style sheets will be applied to the templates in order to match the graphic standards of the Museum's website. The appropriate fields from the collection records will be included for view and only those records ready for public access will be made available. A link will be established enabling seamless searches from the Museum's site by internet users. **Teacher stipends** will be provided to the 8 teachers/curriculum coordinators who participate in course development and pilot phase. These will include a \$65 Museum Family Membership and copy of the Thoreau catalogue.

MATERIALS, SUPPLIES AND EQUIPMENT: An HP Pavilion zt3000 Series Notebook CP (**laptop computer**) (\$1,299), Microsoft Office XP Professional Upgrade software (**Microsoft Power Point**) (\$299) and an InFocus X1 Projector (**LCD Projector**) (\$999) have each been competitively priced either on the internet or published listings to ensure the lowest cost. Use of this technology will help to "expand the Museum's walls" bringing the collection to a wider audience (libraries, historical societies, retirement/assisted living facilities, students). This equipment will also enable the Museum education staff to easily update and tailor the outreach program to audience needs and interests. This technology has been rented by the Museum in the past (current rate \$250) and it is known to work well for outreach programs. The expense related to purchasing this equipment would be recouped after only a few programs. **Re:discovery for Internet** (RFI) software (\$5,200) is an add-on component to the Museum's existing Re:discovery collections management software and is required to enable the collections records to be directly linked to the Museum's website. RFI enables unlimited read-only browsers to enter search criteria, browse data and view search results via a web browser. This software will also enable the staff to access collection records via the internet, thus eliminating the need to purchase additional Re:discovery licenses. The software service agreement for the ten months of the project that it is installed will cost \$910. **Course materials** such as surveying chains (2/\$225 each), compasses (30/\$5 each), and field guides (\$160) are required to allow for hands-on activities that are part of the school courses and outreach programs. Additionally, laminated images (\$400) and a color printer (\$99) are necessary to enhance the visual components, including collection image reproductions. In total, course materials will cost \$1,259. **Photographic transparencies** from David Bohl will cost \$25 per image for 65 prints (\$1,625).

SERVICES: **Warzalla**, a Wisconsin based printer will print and bind 3,000 hardcover copies of the catalogue. They will provide a digital blueprint for approval. Because the printing process is not scheduled to start until mid-February 2005 the total cost of \$22,565 has been adjusted by 3% for inflation to total \$23,242. The unit cost is \$7.75. The quantity was determined based on the ability of the Museum to offer outside vendors a larger margin to encourage distribution. **Shipping** for ground delivery of the 3,000 catalogue copies is estimated to cost \$390. The large format photographs of the collection images will be **scanned** and color tested by Dorian Color Lab at a cost of \$10 per image for 65 images and put on a \$5 CD disk. **David Ford, Graphic Design** will provide the design (\$4,700) and typesetting services (\$2,150). David has extensive experience working on museum quality publications including *The Concord Museum* catalogue. His bid includes six conferences with the Museum and an allowance for changes.

TRAVEL: One of the most difficult expenses for school systems to cover for field trips are the bus transportation costs. During the pilot phase of the course development the Museum is proposing to pay for this charge to encourage the classroom participation and as an incentive to further engage and attract teachers/curriculum coordinators. Each round trip is estimated to cost \$250 and there will be six pilot courses (\$1,500). Travel reimbursement for David Bohl will be required for each day of his photographic work. His round trip distance is 75 miles for five days at \$.30/mile (\$112.5).

MARKETING: The education activities will be marketed to a range of institutions including schools, libraries, senior centers, adult and community education programs, civic organizations, alumni groups, and retirement/assisted living communities. Additionally, the website and catalogue will also be announced and promoted to these target audiences in order to increase awareness of the entire project. The most economical way to promote the all the initiatives and provide the appropriate contact and reservation information is through the printing and mailing of a one color, printed rack card. Carol Haines will be responsible for the concept, design and layout of this multi-focused direct mail piece. Cost includes copying offsite (\$100) and first-class mailing to approximately 675 institutions (\$250).